



Electronic Access Conference *e***magine** 2001

Student Financial Assistance

THE U.S. Department of
EDUCATION



Session 18

Updates & Tips for the EDExpress 8.2 Pell Module

- Who is this session for?
 - Intermediate to Advanced EDEExpress Pell Module users
- Evaluations
- Questions?





Agenda

- Highlight 2002-2003 changes to the EDEExpress Pell Module
- Share EDEExpress Pell Processing Tips



2002-2003 EDExpress Pell Updates



Record Layouts

- Origination Record (Details Pending)
 - Added 3 New Fields to Origination Record due to COD
 - Current SSN
 - DOB
 - Student's Full Name

Pell Grant Tab

- Entry (Origination)
 - School Internal Sequence Number non-required entry field
 - Also available in Query, Browse and File Format
 - Record Source field values added
 - Origination Acknowledgement (O)
 - Origination Web Acknowledgement (W)
 - Year-to-Date Rebuild (X)

Pell Grant Tab

- Entry (continued)
 - Origination Award Amount will accept cents (at Pell Processor)
 - Verification Status Code values modified:
 - V-Verified
 - W-Without Documentation
 - Blank-Not Verified

Pell Grant Tab

- Entry (continued)
 - Screen reorganized to a more logical order
 - Weeks and Hours fields grouped together in separate column
 - Added COA (cost of attendance) to Pell Multiple Entry fields



Disburse Tab

- Entry (Disbursements)
 - View | Processed Edits/Comments available
 - Reference number and comments will be displayed for disbursements carrying comments



Pell Imports

■ Import

— Prior Year Import

- Default school flag will now be carried forward when importing prior year Pell setup information
- Ability to select school setup information by attended campus code



Pell Imports (Continued)

- Import (continued)
 - Edit/Comment Codes will print at the end of the Import Edit Report when importing Origination/Disbursement Acknowledgement files
 - 300 level codes for Origination
 - 400 level codes for Disbursement
 - Will display the Negative Pending Amount on the Origination Import Edit report



Pell Imports (Continued)

- Import (continued)
 - Packaging Data
 - When importing from the Packaging module to create Pell records, will use the new Pell COA field to populate the Pell origination record



Pell Imports (Continued)

- Import (continued)
 - YTD Data
 - Disabled 'Compare And Print Exceptions' checkbox when using Update: Selected option



Pell Exports

- Export
 - Data Request
 - Disabled 'Select All' button when YTD Select Records option is used



Reports

■ New Reports

— Disbursement Pending Report

- Will identify students who do not have disbursement records created with amounts that equal the Origination Award Amount

Reports

- Reports (continued)
 - Origination List
 - Added an EFC identifier which will indicate whether a Primary or Secondary EFC was used
 - List-Batch Activity
 - No longer requires “From” and “To” dates on the print dialog



Pell Process

■ Process

— Process Calculate Award Amount

- Will now include a total # of records set to “ready”, and/or “not ready” at the bottom of the edit report after running ‘Calculate Award Amount for Entire School Year’



Query

- Pell Module Query more robust
 - Will allow comparisons between numerical fields



Help Text

■ Help

- Online help for Pell School Setup will now use Interactive graphics in order to be more 'user friendly'



EDExpress Pell Processing Tips





Tip #1: User Database

- Tools | Setup | Global | User Database
 - Can establish unique field used in all query modules
 - Can use the field in a query to filter records imported into the Pell Module with the Origination Data ISIRs import.
- Multiple Entry/External Add or Change
 - Can use Global Multiple Entry or External import to update user data field(s)



Tip #2: Global Process - Calculate Award Amount

■ Process Calculate

- Applies to Origination Records at Not Ready Status - with all other required fields completed
 - Some formulas can fill in all other fields through Origination Data ISIR import i.e. Standard credit hour schools
 - For those formulas that cannot, they can use Multiple Entry to update remaining fields i.e. Clock hour schools

Tip #3: Query for POP

- Tools | Query | Pell
 - Create query where EDITS COMMENTS RETURNED BY RFMS EQUAL 411
- Print Disbursement List using Query
- File | Export | Pell | Data Request
 - Multiple Reporting Record
 - MRR Type DS
 - Select students on Disbursement list on Select Records Grid



Tip #4: Multiple Entry Disbursements

- Process | Multiple Entry | Pell
 - Select 5 - Award Amount - No value
 - Select 12 Disb. Submit Amount - fill in default amount for Pell Cell EFC Range
 - Select 13 - Disb. Submit Date - fill in default date
 - Selection Criteria - Query Title EFC Range - Select Records
 - Enter Pell Cell Range and select students

Questions?





CPS/WAN Technical Support

We appreciate your feedback and comments. We can be reached:

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